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Basic approach

Background:

- ACT has met twice since meeting with Point
- Once to board hypotheses
- Once to discuss draft work plan
- Modules have been accepted by Team members
- Sub teams are developing work plans and need Point contacts

Preliminary data gathering:

- About one month
- Interviews, focus groups, data gathering and analysis
- Predominantly ACT team, but some help from POINT
- Lets ACT folks get up to speed about Point
- Divided into business analysis/optimization and more focussed, actionable mission and goals
- Need contacts and preliminary analyses
- ACT team wants to start immediately
- ACT meets again as a group June 4

Focus the effort

- Much more sharply focused on key areas of potential improvement
- Contract between ACT and Point
- More joint analysis
- Could be a few months' duration

Socialize results

- Summarize findings
- Address issues that arise
- Constraints
- Gain buy-in
- Point indicates what feels right to do next

Implement

- Jointly developed plan to implement
- Hopefully measurable

HYPOTHESES ABOUT BASIC ISSUE STRUCTURE

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A sharper understanding of need/opportunity combined with product line and sales changes will lead to growth that will satisfy objectives of income and impact.

FINANCE: Trends and goals

- Four product lines
- Need unit, revenue, and costs trends
- Set financial targets according to levels of needs for compensation and impact growth
- Estimate levels necessary for funding new projects

MISSION: Where to have impact

- What interests us?
- What needs do we want to fulfill?
- What are we best suited to provide?
- What areas do we want to have impact on?
- With whom?
- What are the key values that we must observe?

CUSTOMER: Definition and needs

- Profiles of old and new customers
- Needs compared
- Opinions about our product lines
- Their requests
- Their views about alternative sources of information

PRODUCTS: Strategy

- What do we want to produce?
- What subjects are we covering?
- How good are our products?
- What would we like to do?
- How do we want our products to relate to one another?

- Marge Bushman
- Wants to do focus group Mon eve 5/20

PROMOTION AND SALES: Methods

- How do we promote and sell now?
- How does this compare to superior participants in our businesses?
- What are our options about increasing the level of paid advertising?